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(71) Applicant and

(72) Inventor: STEPHANOU, Dimitri [US/US]; 19204 Aria Court, Brookeville, MD 20833 (US).

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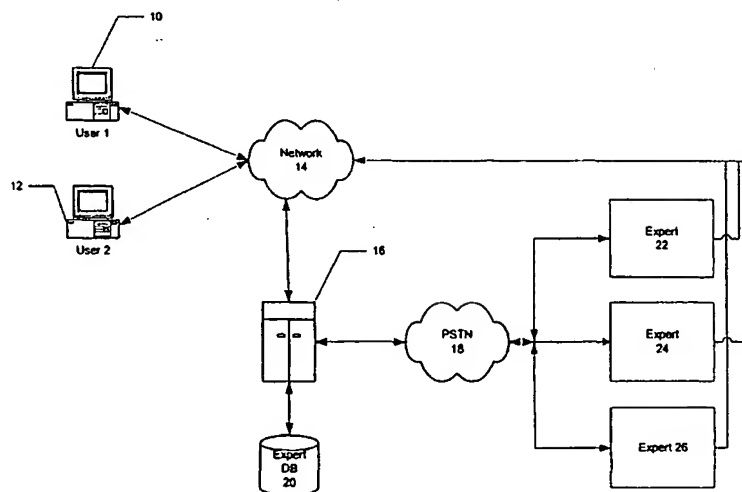
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(74) Agents: ROBERTS, Jon, L. et al.; Roberts Abokhair and Mardula, LLC, Suite 1000, 11800 Sunrise Valley Drive, Reston, VA 20191 (US).

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(54) Title: SYSTEM AND METHOD FOR PROVIDING EXPERT REFERRAL OVER A NETWORK WITH REAL TIME INTERACTION WITH CUSTOMERS



(57) Abstract: A system and method for assigning an expert to a request for assistance including real time interaction. The invention allows users to request assistance over the internet to an expert server having a file of qualified experts. The trouble "ticket" is assigned an alias and is sent out to a number of experts having the correct qualifications who then have an opportunity to respond. The first to respond is assigned an alias and communicates in real time with the requester via the expert server. Upon completion of the ticket, the expert so designates and the requester is asked to fill out a survey noting the satisfaction with the service provided. Experts are assigned ranking and are paid and solicited for further work based upon the ranking. The system of the present invention is used in a variety of disciplines.

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Title of Invention: System and Method for Providing Expert Referral Over a Network with Real Time Interaction with Customers

Relationship to Other Applications:

This application is a utility application which claims the benefit and priority of Provisional Application No. 60/167,065 entitled “System and Method for Providing Expert Help Over a Network” filed 11/23/99.

Field of the Invention:

This invention relates generally to network access to for expert referral. More particularly the present invention provides a system and method for obtaining assistance via network notification to experts and subsequent expert-to- customer contact.

Background of the Invention:

As computers and software proliferate, the need for help desk assistance becomes more and more critical especially to those customers who are not technically sophisticated. The difficulty is that individual customers become frustrated when they must sit on a help line for many hours before they get human assistance or, equally frustrating, are shunted to a frequently asked question screen, which has the answers to many questions that are not helpful for the particular problem that the individual customer is experiencing.

The present invention seeks to solve these problems by qualifying and establishing a large number of experts in various hardware and software fields. For example, the present invention will solicit and store qualifications for experts in Microsoft Windows, Sun products, Apple products, and indeed, many other hardware and software products.

1 These experts, most of whom will be independent contractors, will be directly accessible
2 via the database of the present invention.

3 After registration with the system of the present invention and providing customer
4 contact information such as telephone number and email, when a customer needs
5 particular assistance with a particular product, the customer will access the website of the
6 present invention and state the problem being experienced. Once a query for help is
7 made, the system of the present invention sends a pager or other notification signal to an
8 appropriate expert who can handle the problem being experienced by the customer.
9 Indeed, a call may go out to multiple experts all of whom have the option to respond to the
10 particular request. Contact information is also presented to the experts in this first
11 communication.

12 Whichever expert responds first to the request, that expert will have the contact
13 information to immediately contact the customer experiencing the problem. In this
14 fashion, one of the key problem areas, that is time of responding to a problem, is
15 minimized.

16 The customer can then respond either via email through the server of the present
17 invention to the customer or via internet telephone through the server of the present
18 invention to the customer. In either case response goes through the server of the present
19 invention in order to be able to track such statistics as response time, and whether the
20 customer was satisfied or dissatisfied with the response of the particular expert.

21 In responding to the customer, several modes of communication can take place.
22 As noted above, email between the customer and the expert can occur. However, in those
23 cases where a more consistent contact is required during troubleshooting, the system
24 provides for a real time "chat" session to take place whereby an ongoing conversation via

1 a typical chat window is established. In the event that even more contact is required, a
2 video conferencing link may also be established by the server of the present invention to
3 allow troubleshooting to occur in a more visual fashion. Yet another route which may be
4 established is internet telephony between expert and customer. All of these methods are
5 within the scope of the present invention and are designed to solve the problem being
6 encountered by the customer quickly and efficiently

7 Once the problem is solved, the customer who experienced the problem is given
8 the option of responding to a questionnaire simply asking if the problem was solved, if the
9 expert was responsive to the question, and several other key questions that will assist the
10 system of the present invention in evaluating the performance of the expert.

11 Statistics will be kept on the performance of experts involved in the system. For
12 those experts who continually rank highly, calls for assistance will continue to go to those
13 experts on a priority basis. For those experts who are not as successful, they will fall
14 lower in the priority list and will not receive as many calls for assistance from the system.

15 The present invention is is adaptive. If an expert who is lower on the priority list
16 continues to get high grades from customers for accomplishing tasks, that expert can
17 climb in the rankings and achieve a priority ranking thereby receiving more request for
18 assistance and hence, more revenue from responding to customers needs. Conversely,
19 those experts who do not receive favorable rankings from customers will fall in the overall
20 rankings of experts and will not receive as many phone calls for assistance an hence, will
21 not receive as much revenue from the present invention.

22 All transactions, in the preferred embodiment occur via the internet, although this
23 not meant as a limitation, whether they be by email, or internet telephone. It will be
24 apparent to those skilled in the art that communication between customer and expert can

1 also occur via telephone as well. And all transactions will proceed through the server of
2 the present invention so that activities of experts and statistics on types and frequencies of
3 certain troubled calls can be monitored.

4 In summary what is created is a virtual help desk, having experts in many different
5 areas of expertise immediately and competently responding to the queries for help from
6 customers who are in need.

7 **Brief Description of the Figures:**

8 Figure 1 illustrates the architecture of the present invention.

9 Figure 2 illustrates the overall assign up, assignment, and expert response flow of
10 the present invention.

11 Figure 3 illustrates the expert enrollment and interaction with the system of the
12 present invention.

13 Figure 4 illustrates login screen for the Expert Help Network.

14 Figure 5 illustrates a screen in which the customer selects whether he needs help or
15 is an expert.

16 Figure 6 illustrates a screen consisting of a data entry sheet requesting a plurality
17 of answers pertaining to customer identification.

18 Figure 7 illustrates the customer's customer ID and password for entering the
19 Expert Help Network.

20 Figure 8 illustrates a screen which confirms the customer's Name, city, and email
21 address that is currently valid in the system.

22 Figure 9 illustrates a plurality of questions pertaining to the customer's problem.

23 Figure 10 illustrates a plurality of items of information regarding the customer's
24 ticket.

1 Figure 11 illustrates a plurality of statuses regarding the customer's ticket(s).

2 Figure 12 illustrates a plurality of criteria for experts to join the Expert Help
3 Network.

4 Figure 13 illustrates a plurality of questions and answers pertaining to experts.

5 Figure 14 illustrates a synopsis of how the network functions and the role of
6 experts.

7 Figure 15 illustrates a plurality of requests for items of information regarding
8 contact information for the expert(s).

9 Figure 16 illustrates a plurality of pull down menus regarding the expert's skills.

10 Figure 17 illustrates a request for a plurality of items of information regarding
11 experience as an expert.

12 Figure 18 illustrates a plurality of items of information regarding references for
13 experts.

14 Figure 19 illustrates the conceptual flow for assigning an alias to customer
15 problems and experts assignments.

Detailed Description of the Invention

Referring to Figure 1, the overall architecture of the present invention is illustrated.

A plurality of customers, indeed anyone connected to the internet 9 or a network contemplated as one to be used with the present invention, her illustrated simply as two customers, customers 10 and 12, who are connected to the internet, may experience some form of computer-related or other type of problem. Customers 10, 12 contact the Expert Reference Server (ER Server) 16 via a network, preferably the internet 14 although this is not meant as a limitation. For example other networks in addition to the internet can also be used. Customers 10, 12 pose the particular question or problem being encountered with their system to the ER Server 16 over the network 14.

Depending upon the type of problem cited, ER Server 16 reviews its database of experts 20 for the individual or individuals who are capable of responding to the questions from customers 10, 12. This database of experts not only has qualifications of the experts but also maintains a database of their availability if, for example, an expert is on vacation for a period of time or is unavailable during a period of the day. Upon determining the appropriate individual(s) who can respond to the problem, ER Server 16 sends a message via any means known in the art such as wired or wireless as in the case of beepers and cell phones, in this case illustrated as over the public switch telephone network (PSTN) 18 to the beepers of experts 22, 24, 26 with a general reference to the type of problem being encountered. This notification via PSTN is for illustrative purposes only. It is anticipated that the experts can also be notified via the internet and the various means, such as internet paging and telephone for example, available via the internet.

Experts 22, 24, 26 are beeped and, preferably an alphanumeric display noting the problem being posed by customers 10, 12 is displayed. At that point any one of the

1 experts 22, 24, 26 can respond to ER Server 16 that he will handle the problem being
2 posed.

3 Contact from experts 22, 24, and 26 can occur via the public switch telephone
4 network 18 or via the network 14 to the ER Server 16.

5 Thereafter, and assuming, for example expert 22 responded first to the query, ER
6 Server 16 allows contact between expert 22 and, for example customer 12 in the following
7 fashion:

8 Internet telephone service can be used whereby expert 22 is connected to customer
9 12 through server 16. In this fashion, ER Server 16 can monitor the length of the call and
10 broker the connection between expert 22 and customer 12. Alternatively, the telephone
11 number of customer 12 can be provided to expert 22. Thereafter, expert 22 can contact
12 customer 12 to solve the problem by voice communication. Where facilities exist, a
13 videoconferencing session can be arranged. In addition, the ER server 16 has the
14 capability to establish a real time "chat" session between the customer and the expert.
15 Finally, ER Server 16 can provide the email address of customer 12 to expert 22 thereby
16 allowing email response to the problem being posed and also allowing back and forth
17 communication over network 14. Any of these methods are deemed to be within the
18 scope of the present invention and facilitate solving the customer's problem in an effective
19 and efficient manner.

20 After the completion of the service call by the means discussed above, expert 22
21 provides notification to ER Server 16 that the call has been successfully completed.
22 Expert Server 16 logs the completion time and date of the trouble call that was requested
23 by the customer. In this way, statistics on the general length of time to respond to and

1 solve customer problems can be logged. Further, information on the individual expert can
2 also be kept in the following fashion:

3 ER Server 16 not only brokers a trouble call between customers 10, 12 and experts
4 22, 24, and 26, but also keeps track of how well the individual experts perform in their
5 assigned tasks. For example, at the completion of each trouble call, and after the expert
6 has provided notification to the ER Server that the call has been completed, the ER Server
7 provides a questionnaire to the customers 10, 12 seeking input on customer satisfaction
8 with the service being offered. At that point, customers 10, 12 have the opportunity to
9 respond to ER Server 16 regarding whether the experts 22, 24, or 26 solved the problem
10 successfully and in a timely fashion.

11 ER Server 16 collects statistics on the performance of experts 22, 24, and 26,
12 thereby monitoring the performance of these experts. If any of the experts continually
13 score poorly in the estimation of customers 10, 12, the ranking of that particular expert
14 will be established as lower than that of the experts who perform successfully on various
15 assigned tasks. This has several ramifications. If a particular expert does not perform
16 well, that expert is put low on the priority list for being contacted by ER Server 16. If the
17 expert continues to perform poorly on the tasks that are assigned, eventually the expert
18 will be eliminated from the roll of experts who can respond to service calls. Conversely,
19 if an individual expert who initially performed poorly begins to perform better on service
20 calls assigned to that expert, ER Server 16 will keep track of that improvement thereby
21 raising the priority of that expert and list of experts who will be called to respond to
22 service calls. In this fashion, expert database 20 is continually updated and quality control
23 on the experts who are contacted and assigned customer tasks can therefore be maintained.

1 In this fashion, a series of problems are solved by the system and method of the
2 present invention. First, individual customers 10, 12 no longer have to wait inordinate
3 amounts of time for response to trouble calls on their computer systems.

4 ER Server 16 establishes the mutual arrangement between customers 10 and 12
5 before any service call is made to experts 22, 24, and 26. In this fashion, experts 22, 24,
6 and 26 do not have to be concerned about how to invoice and collect fees from customers
7 10, 12.

8 Customers 10, 12 benefit from having the best experts who can solve technical
9 problems since the ER Server 16 continually updates and establishes quality control via its
10 expert database 20 over the experts who are called to respond to trouble calls in the first
11 place.

12 On a periodic basis, ER Server 16 and the business entity that surrounds that
13 server, remits to experts 22, 24, and 26 their fees for the service calls responded to on a
14 monthly or quarterly basis as desired.

15 Referring now to Figure 2 the overall assign up, assignment, and expert response
16 flow of the present invention is illustrated. A customer accesses the system of the present
17 invention 100 preferably over the Internet although this is not meant as a limitation. For
18 example, a customer may also provide information via a telephone or other means of
19 communication.

20 Confirmation of the sign-up is then sent to the customer member via electronic
21 mail 102 providing a log in ID and password. Thereafter, either immediately upon receipt
22 of the e-mail or on a subsequent occasion when services are needed the customer member
23 logs into the system 104. At this point the customer member has a number of options.

1 If the customer member is signing on initially the customer member can create or
2 change the customer membership profile 148. This profile provides information on the
3 customer members organization, the type of equipment, and any other information relating
4 to software and operating systems being run on the equipment and the network as
5 appropriate.

6 The customer member also has the option of changing the customer member's
7 password 150. If the customer member has already provided a request for assistance
8 referred to as a "ticket" a customer member can view the ticket history 152. If the ticket
9 relates to a particular problem that the customer member has asked to be solved, the
10 customer member can view the specific ticket 154 to insure that the problem has been
11 stated appropriately. Additionally the customer member is asked to fill out a survey 156
12 that relates to how well the problem was solved, was the problem solved in a timely way,
13 was the interaction with the expert satisfactory and other factors that would give rise to
14 quality assurance with respect to managing the experts who are affiliated with the system
15 of the present invention. After the survey is completed it is submitted by the customer
16 member 158 and the ticket is closed by the system. Thereafter billing for the services is
17 accomplished 159.

18 Once the customer member has an account number and a password, the customer
19 member can call in at any time whenever there is a problem requiring a consultant. In this
20 instance, a customer member logs onto the system 104 and creates a ticket 106 which
21 describes the difficulty being encountered in as much detail as possible. Once the screen
22 detailing the problem has been completed the ticket is submitted 108 by the customer
23 member. Confirmation email is sent to the customer member. The server of the present
24 invention then takes the ticket that is submitted and e-mails it 110 to the appropriate

1 expert group for response. In this instance the group may be a group of network experts, a
2 group of experts in a particular software application, and the like. It should also be noted
3 that communication with the expert groups is made by regular e-mail and wireless devices
4 to the extent that the database has the appropriate communication information. This
5 system then continually inquires to determine if any expert has responded to the ticket and
6 indicated that he or she would respond. This is referred to as "booking" the ticket 112. If
7 after a definable number of minutes the ticket is still not booked 114 the system sends e-
8 mails to another group of experts who can appropriately respond to the question being
9 posed.

10 If the ticket has been booked by an expert 112 the system determines how the
11 ticket was booked 116. If the expert responded over the Internet the Internet procedures
12 invoked 117 as will be more fully explained below.

13 If the expert responded via e-mail the experts e-mail response is received by the
14 system 118 and the system assigns the ticket to the expert who responded 120.

15 Upon assigning the ticket to the expert 120 an e-mail or other notification is sent to
16 the expert requesting that he initiate customer contact. In addition, e-mail is sent to other
17 experts in the group of expert to whom e-mail was sent informing them that the ticket was
18 booked to another expert 124 although the identify of the expert to whom the ticket was
19 booked is not necessarily disclosed.

20 As further noted below, communication and record keeping of the system involves
21 assigning alias numbers to both the request for assistance and for the response by the
22 expert in order to ensure that communication flows through the server of the present
23 invention.

1 The expert then communicates with the customer member 128 and the customer member
2 interacts with the expert 126 to solve the problem disclosed in the ticket.

3 When the ticket has been closed, that is, the problem has been solved by the
4 expert, the expert so notifies the server of the present invention to close the ticket and
5 enters information that describes how the problem was resolved 130. The server then
6 sends an e-mail message to the customer member 132 noting that the expert has closed the
7 ticket and has solved the problem. The e-mail also requests that the customer member fill
8 out a survey to note the customer members satisfaction with the problem solution, the
9 experts performance, and any other factor that affects the resolution of the ticket originally
10 submitted by the customer member.

11 The survey is a critical aspect of the present invention and is done in an automated
12 fashion to minimize the labor associated with the customer member's participation in the
13 survey. Further, the survey serves as a basis for paying experts for work accomplished or
14 not paying experts when the result has been unsatisfactory to the customer member.

15 After submission of the survey to the customer member, the system continually
16 inquiries in its own records to determine if the survey report has been filled out 134. If the
17 survey has not been filled out after two days, a second e-mail request for the completion
18 of the survey is sent to the customer 136. The system then again keeps track internally to
19 determine if the survey has been filled out 138. If the survey has not been filled out after,
20 for example two days, a final e-mail request is sent to the customer member 140 to fill the
21 survey out. The system then again internally monitors whether the survey has been
22 completed 142. If the survey has not been completed the survey is automatically filled in
23 with certain default values and the ticket status is changed to a "closed" status 144.
24 Thereafter billing of the customer member ensues 145.

1 When the customer member is in the process of completing the survey the
2 customer member logs in 146 and views the ticket history 152.

3 The customer member can then complete the survey as noted earlier 156 and
4 submit that survey to the system 158. Thereafter billing ensues.

5 Referring now to Figure 3 the expert enrollment and interaction with the system is
6 illustrated. An expert initially logs onto the system of the present invention and signs up
7 to become an expert 160 who can be called upon to satisfy various tickets. The system of
8 the present invention then sends an e-mail to the expert 162 confirming his registration
9 and informing him of the pending assessment of the expert qualifications, and that this
10 will take place BEFORE the expert is assigned any tickets by the system. In this way the
11 entity managing the server of the present invention ascertains the expert's qualifications
12 and areas of expertise. If the expert is not qualified in any of the areas in which the
13 system responds to customer members an e-mail is sent to the experts so notifying the
14 expert. If the expert has the requisite qualifications a confirmation e-mail is sent to the
15 expert 168 and the expert is then logged onto the system. The expert is assigned a
16 password and customer identification number for which the expert can then log in 170.

17 At any point the expert can change or alter the expert's profile 172 thereby
18 allowing the expert to more particularly respond to and be provided with information on
19 tickets.

20 When the expert logs in 170 the expert can check in and out of the system 174 and
21 change the expert's availability 176 so that the system knows when the expert will be
22 available to receive requests for ticket response.

23 The expert can also note the experts own tickets 178 that have been responded to,
24 assigned and are in progress. The expert can click on any ticket that is noted and view a

1 specific ticket 180 and determine if the ticket has been closed 182. If the ticket is not
2 closed, it continues to be listed on those open tickets assigned to the expert 178. If the
3 ticket is closed as far as the expert is concerned, the expert assigns a "close pending" to the
4 ticket as noted earlier in Figure 2 130.

5 Once the expert logs in 170 the expert can also go to a file of unassigned tickets
6 184 and view any specific one ticket 186 and determine if the expert can respond to the
7 ticket. If the expert can respond the expert will book the ticket as noted earlier in Figure 2
8 120.

9 Upon entering the website, Fig. 4, the customer is presented with a login screen
10 which asks also whether the customer is an expert or needs help 200. If the customer is not
11 a customer member of the service, he is presented with a screen, Fig 5, in which he must
12 select whether he needs help or he is an expert 202.

13 If the customer member selects the "I need help" option 202, the customer member
14 is presented with a screen, Fig. 6, which consists of a data entry sheet requesting a
15 plurality of answers pertaining to customer identification 204. Upon completion of the
16 data entry sheet, Fig. 6, the customer member is presented with a screen, Fig. 7, which
17 furnishes the customer member with his customer member ID and password 206.

18 In the Customer Home screen Fig. 8, which confirms the customer member's
19 Name, City, and email address 208 that is currently valid in the system. Upon selecting
20 "View/Create Ticket" the customer member is presented with a screen, Fig. 9, which asks
21 whether this is a new ticket 210 and under what category this ticket is to be considered
22 212. Examples of categories are MS Exchange, Windows NT, etc. Additionally, the
23 customer member is furnished with a text box in which he enters a description of his

1 current problem 214. The customer member is also presented with a button which allow
2 him to enter the ticket 216.

3 Once the ticket is entered, the customer member is presented with a screen, Fig.
4 10, which furnishes a plurality of items of information regarding the customer member's
5 ticket 218. The customer member is notified by the expert via email (although this is not
6 meant as a limitation) when he has been assigned to the trouble call 220 by the server.

7 If the customer member selects "Ticket History," 222 he is presented with a screen,
8 Fig. 11, which furnishes a plurality of statuses regarding his ticket(s) 224.

9 If the customer selects the "I am an expert" option 200, the customer is presented
10 with a screen, Fig. 12, which gives some of the criteria for experts to join the Expert Help
11 Network 226. If the customer selects the "FAQ" (frequently asked questions) button 228,
12 he is presented with a screen, Fig. 13, which answers a number of question pertaining to
13 experts and the Expert Help Network.

14 If the customer selects the "How it works" button 230, he is presented with a
15 screen, Fig. 14, which gives a synopsis of how the Expert Help Network functions and the
16 function of experts in the network.

17 If the customer selects the "Sign up" button 232, he is presented with a screen, Fig.
18 15, which furnishes a plurality of requests for items of information regarding contact
19 information for the expert 234. Upon selecting the "Next" button 236, the customer is
20 presented with a screen, Fig. 16, with a plurality of pull down menus regarding his skills
21 238.

22 If the customer selects the "Next" button 236, he is presented with a screen, Fig. 17,
23 which requests a plurality of items of information regarding his experience as an expert

1 240. If the customer selects the "Next" button 236, he is presented with a screen, Fig. 18,
2 which requests a plurality of items of information regarding references as well as a text
3 box for entering data pertinent to the reference 242.

4 Referring to Figure 19, the present invention performs an "aliasing"
5 function to both ensure that communication between the ultimate client and the expert
6 occurs through the server of the present invention.

7 When a ticket is open 250, the server creates an alias 252 for the ticket that is
8 open. This alias is assigned to not only the ticket, but is associated with the person or
9 entity that is having the particular problem. In this fashion, the server can always
10 determine who the point of contact is at the customer entity for billing and survey
11 purposes.

12 The ticket number with the associated alias is then made available to experts to
13 respond to. When an expert accepts the particular troubled ticket 254, the expert is
14 assigned an alias 256 which is associated with the ticket alias created 252. This expert
15 alias 256 varies from ticket to ticket so that a particular expert who accepts five different
16 tickets may in fact have five different aliases associated with the different tickets. All
17 communication with respect to the problem occurs via the server which then associates the
18 various ticket and expert aliases and ensures that communication reaches the ultimate
19 customer from the expert.

20 When the ticket is closed 258, the various aliases are cleared 260 and these aliases
21 are subsequently made available for further tickets and aliases. Thus, the unique alias for
22 the ticket and for the expert accepting the ticket occur only so long as the ticket is opened.
23 Once the ticket is closed, the alias numbers are made available again for re-use.

1 The system and method of the present invention can also be used in a general way
2 to dispatch experts in a variety of other service areas. For example, people may have
3 difficulty with electrical systems, plumbing, stereo systems, and a wide variety of other
4 household tasks where the customer member can simply benefit from someone "talking"
5 them through the problem. Thus the application of this expert reference system of the
6 present invention is not meant as a limitation but is illustrative of the concept of having a
7 wide variety of unaffiliated experts who can respond via an expert reference server to the
8 problems of customer members in a variety of categories.

9 As a further example, and without limitation, many businesses have human
10 resources (HR) issues that require expert assistance but cannot afford to have an HR
11 person present on staff. The systems and method of the present invention will allow HR
12 experts to be on call to respond to questions in precisely the same manner as in the
13 information technology example noted above. Other such examples of the use of the
14 present invention are for legal service, technical experts within a large company being
15 referred to others within the same company, getting the most qualified plumbing expert
16 for the job and other similar choices where expertise is required.

17 It will therefore be apparent to those skilled in the art that other variations of the
18 present invention in contacting experts via wired and wireless networks and in contacting
19 customer members by the experts using both wired and wireless means can be achieved
20 without departing from the scope of the invention as disclosed.

1 I claim:

- 2 1. A system for obtaining expert referral comprising:
- 3 a server further comprising a file of experts having qualifications;
- 4 a network connected to the server for allowing access to the file of experts;
- 5 at least one user computer connected to the network for submitting a request for
- 6 assistance ticket from a user and for accessing the file of experts in the server;
- 7 the server further comprising assignment instructions for assigning the request for
- 8 assistance ticket to at least one expert for response and for receiving a response
- 9 from the at least one expert to the assignment; and
- 10 the server further comprising real time communication instructions for facilitating
- 11 the real time communication between the expert and the user regarding the request
- 12 for assistance ticket.
- 13 2. The system for obtaining expert referral of claim 1 wherein the server further
- 14 comprises instructions for registering and qualifying experts to be resident on
- 15 the file of experts.
- 16 3. The system for obtaining expert referral of claim 2 wherein the assignment
- 17 instructions further comprise contact information for contacting a the plurality
- 18 of experts based upon expert qualifications.
- 19 4. The system for obtaining expert referral of claim 1 wherein the server further
- 20 comprises instructions for sending a satisfaction questionnaire to the user upon
- 21 completion of the request for assistance ticket by the expert to whom the
- 22 request for assistance ticket was assigned.
- 23 5. The system for obtaining expert referral of claim 4 wherein the server further
- 24 comprises instructions for creating a quality ranking for the expert to whom the

1 request for assistance ticket was assigned.

2 6. The system for obtaining expert referral of claim 5 wherein the server further
3 comprises instructions for paying to expert based upon the quality ranking
4 from the user.

5 7. The system for obtaining expert referral of claim 5 wherein the server further
6 comprises instructions for rank ordering experts based upon quality ranking
7 and assigning subsequent requests for assistance based upon quality rankings.

8 8. The system for obtaining expert referral of claim 1 wherein the server further
9 comprises instructions for assigning an alias to the request for assistance from
10 a user and for assigning an alias to the expert who responds to the request for
11 assistance.

12 9. The system for obtaining expert referral of claim 8 wherein communication
13 between the expert and the user occurs through the server and wherein the
14 server comprises a file of assigned aliases for routing messages between the
15 expert assigned to the request for assistance the user making the request for
16 assistance.

17 10. The system for obtaining expert referral of claim 2 wherein the instructions for
18 registering and qualifying experts further comprises recording the availability
19 of experts to respond to requests for assistance and the areas of expertise of the
20 expert.

21 11. The system for obtaining expert referral of claim 1 wherein the server further
22 comprises instructions for allowing a user to view the a status of tickets for the
23 user.

24

- 1 12. A method for expert referral comprising:
2 a user requesting assistance over a first network;
3 a server receiving the request for assistance and creating a ticket associated
4 with the request;
5 the server communicating the ticket to a plurality of qualified experts over a
6 second network;
7 at least one expert responding to the ticket; and
8 the server facilitating real time communication between the expert and the user
9 to solve the ticket.
- 10 13. The method for expert referral of claim 12 wherein the plurality of experts is
11 created by registering experts and verifying their qualifications before
12 communicating the ticket to any one expert.
- 13 14. The method for expert referral according to claim 12 wherein the first network
14 is the internet and the second network is the internet.
- 15 15. The method for expert referral according to claim 12 wherein the first network
16 is the internet and the second network is a PSTN.
- 17 16. The method for expert referral according to claim 12 wherein the first network
18 is the Internet and the second network is a wireless network.
- 19 17. The method for expert referral according to claim 12 wherein the facilitating of
20 communication comprises the server assigning an alias to the user and an alias
21 to the expert; and passing communication between the expert and the user
22 through the server by associating the user alias and the expert alias.
- 23 18. The method for expert referral according to claim 12 further comprising the
24 expert closing the ticket with the server upon completion of the ticket by the

- 1 expert and the server submitting a satisfaction survey to the user upon the
2 completion of the ticket by the expert.
- 3 19. The method for expert referral according to claim 18 further comprising paying
4 the experts based upon the satisfaction survey.
- 5 20. The method for expert referral according to claim 18 further comprising
6 creating a ranking of the expert based upon the satisfaction survey.
- 7 21. The method for expert referral according to claim 20 further comprising
8 assigning subsequent tickets to the expert based upon the expert ranking.
- 9 22. The method for expert referral according to claim 17 further comprising the
10 server clearing the aliases upon completion of the ticket.
- 11 23. The method for expert referral according to claim 12 wherein the server
12 facilitating communication between the expert and the user comprises the
13 server establishing communication via video teleconferencing.
- 14 24. The method for expert referral according to claim 12 wherein the server
15 facilitating communication between the expert and the user comprises the
16 server establishing communication via internet telephony.
- 17 25. The method for expert referral according to claim 12 wherein the server
18 facilitating communication between the expert and the user comprises the
19 server establishing communication via online chat session.
- 20 26. The system for obtaining expert referral of claim 1 wherein the real time
21 communication instructions further comprise instruction for establishing on-
22 line chat between the expert and the user.
- 23 27. The system for obtaining expert referral of claim 1 wherein the real time
24 communication instructions further comprise instruction for establishing

1 internet telephony between the expert and the user.

2 28. The system for obtaining expert referral of claim 1 wherein the real time
3 communication instructions further comprise instruction for establishing video
4 teleconferencing between the expert and the user.

5 29. A system for obtaining expert referral comprising:
6 a server further comprising a file of experts having qualifications;
7 a network connected to the server for allowing access to the file of experts;
8 at least one user computer connected to the network for submitting a request for
9 assistance ticket from a user and for accessing the file of experts in the server;
10 the server further comprising assignment instructions for assigning the request for
11 assistance ticket to at least one expert for response and for receiving a response
12 from the at least one expert to the assignment; and
13 the server further comprising communication instructions for facilitating the
14 communication between the expert and the user regarding the request for
15 assistance ticket.

16 30. The system for obtaining expert referral of claim 29 wherein the server further
17 comprises instructions for registering and qualifying experts to be resident on
18 the file of experts.

19 31. The system for obtaining expert referral of claim 30 wherein the assignment
20 instructions further comprise contact information for contacting a the plurality
21 of experts based upon expert qualifications.

22 32. The system for obtaining expert referral of claim 29 wherein the server further
23 comprises instructions for sending a satisfaction questionnaire to the user upon
24 completion of the request for assistance ticket by the expert to whom the

1 request for assistance ticket was assigned.

2 33. The system for obtaining expert referral of claim 32 wherein the server further
3 comprises instructions for creating a quality ranking for the expert to whom the
4 request for assistance ticket was assigned.

5 34. The system for obtaining expert referral of claim 33 wherein the server further
6 comprises instructions for paying to expert based upon the quality ranking
7 from the user.

8 35. The system for obtaining expert referral of claim 33 wherein the server further
9 comprises instructions for rank ordering experts based upon quality ranking
10 and assigning subsequent requests for assistance based upon quality rankings.

11 36. The system for obtaining expert referral of claim 29 wherein the server further
12 comprises instructions for assigning an alias to the request for assistance from
13 a user and for assigning an alias to the expert who responds to the request for
14 assistance.

15 37. The system for obtaining expert referral of claim 36 wherein communication
16 between the expert and the user occurs through the server and wherein the
17 server comprises a file of assigned aliases for routing messages between the
18 expert assigned to the request for assistance the user making the request for
19 assistance.

20 38. The system for obtaining expert referral of claim 30 wherein the instructions
21 for registering and qualifying experts further comprises recording the
22 availability of experts to respond to requests for assistance and the areas of
23 expertise of the expert.

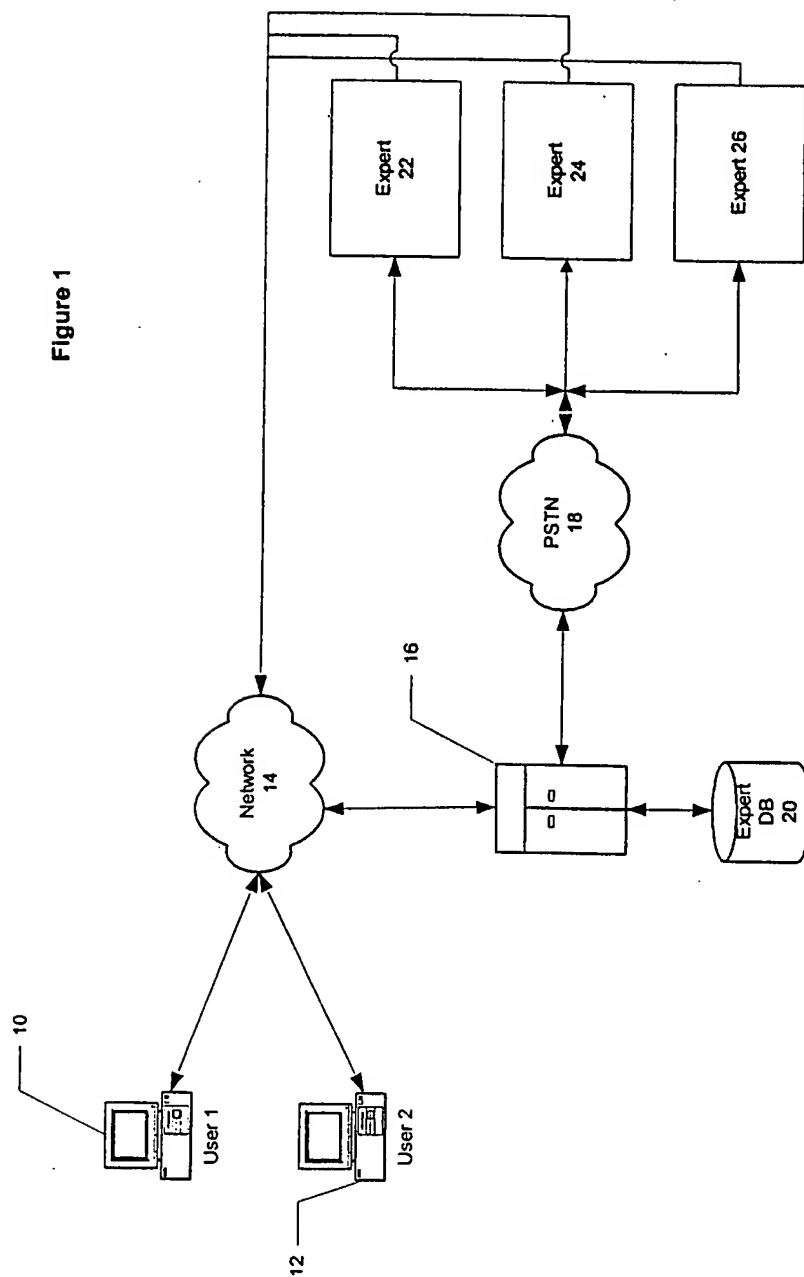
24 39. The system for obtaining expert referral of claim 29 wherein the server further

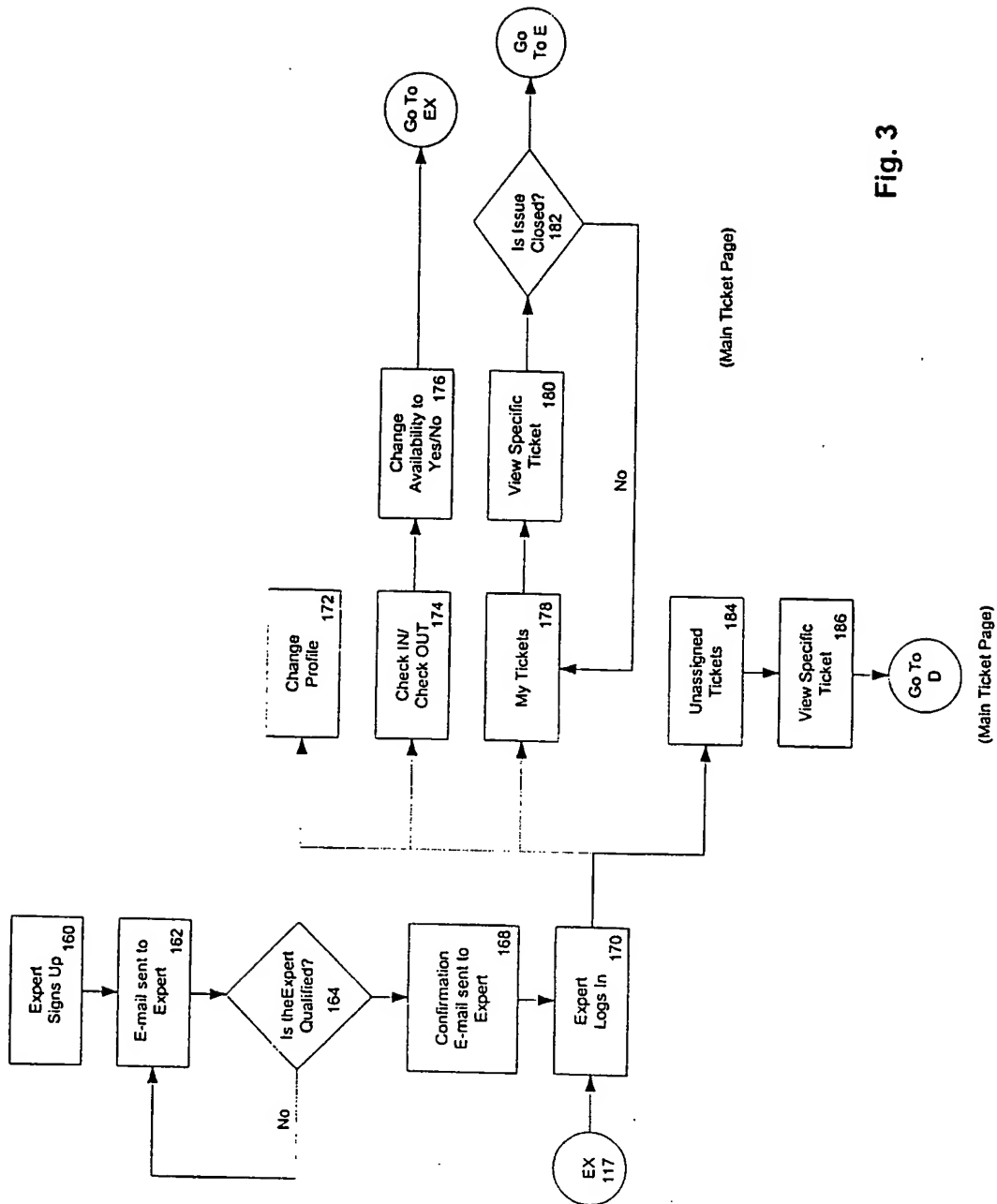
1 comprises instructions for allowing a user to view the status of tickets for the
2 user.

3

4

Figure 1





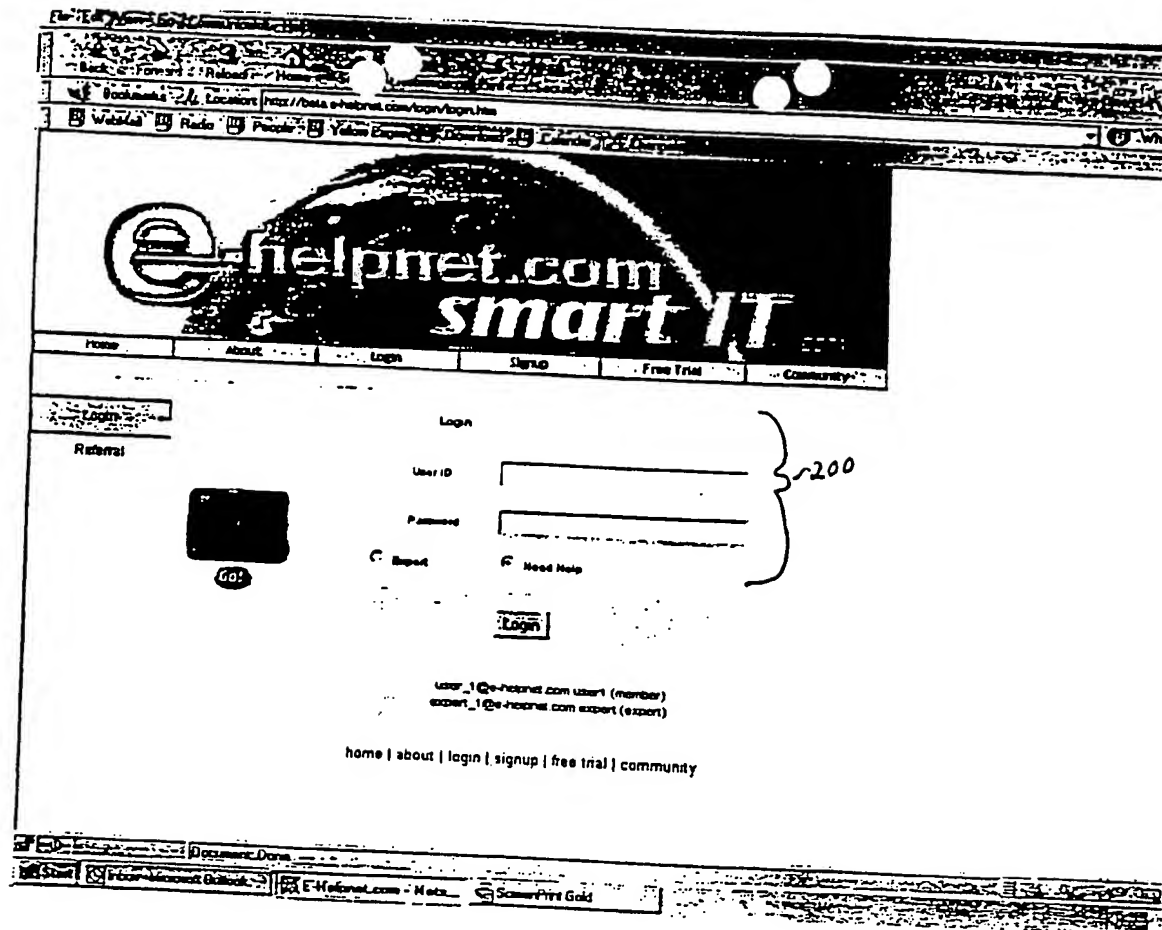


Fig. 4

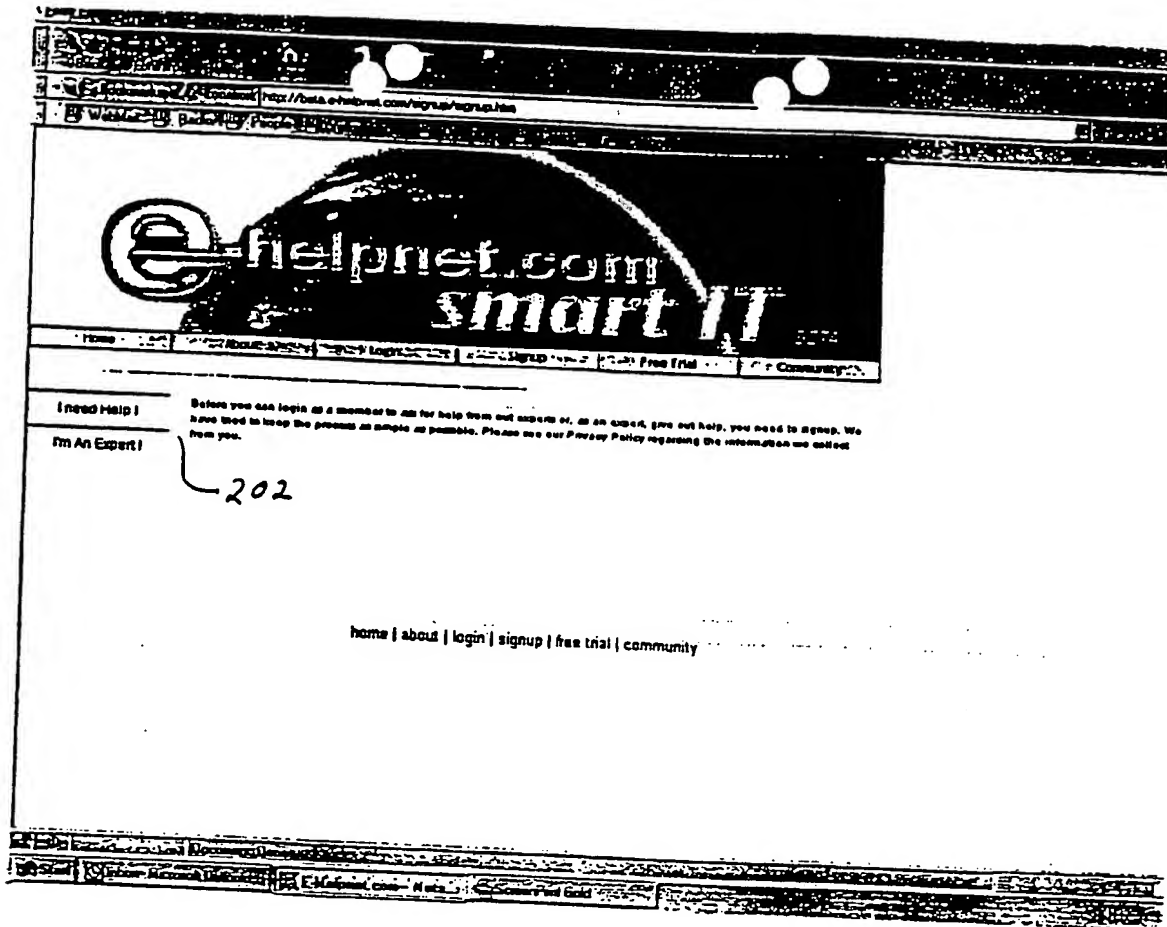


Fig. 5

File Edit View Go Communications Help

Back Forward Reload Home

Bookmarks Location http://beta.e-helpnet.com/signup/member/member_signup.htm

WebMail Radio People Yahoo Pages Download

e-helpnet.com
smart IT

Home About Login Signup Free Trial Community

I Need Help!

Who Can Join?

FAQ

How It Works

Signup

NOTE: An asterisk (*) indicates a required field.

First name

Last name

Password

Confirm Password

Company

Email

Address

Address2

City

State

ZIP

Country

How Did You Hear About Us

USA

204

Document: Done

Start Inboxes - Microsoft Outlook E-Helpnet.com - Netscape ScreenPrint Gold

Fig. 6

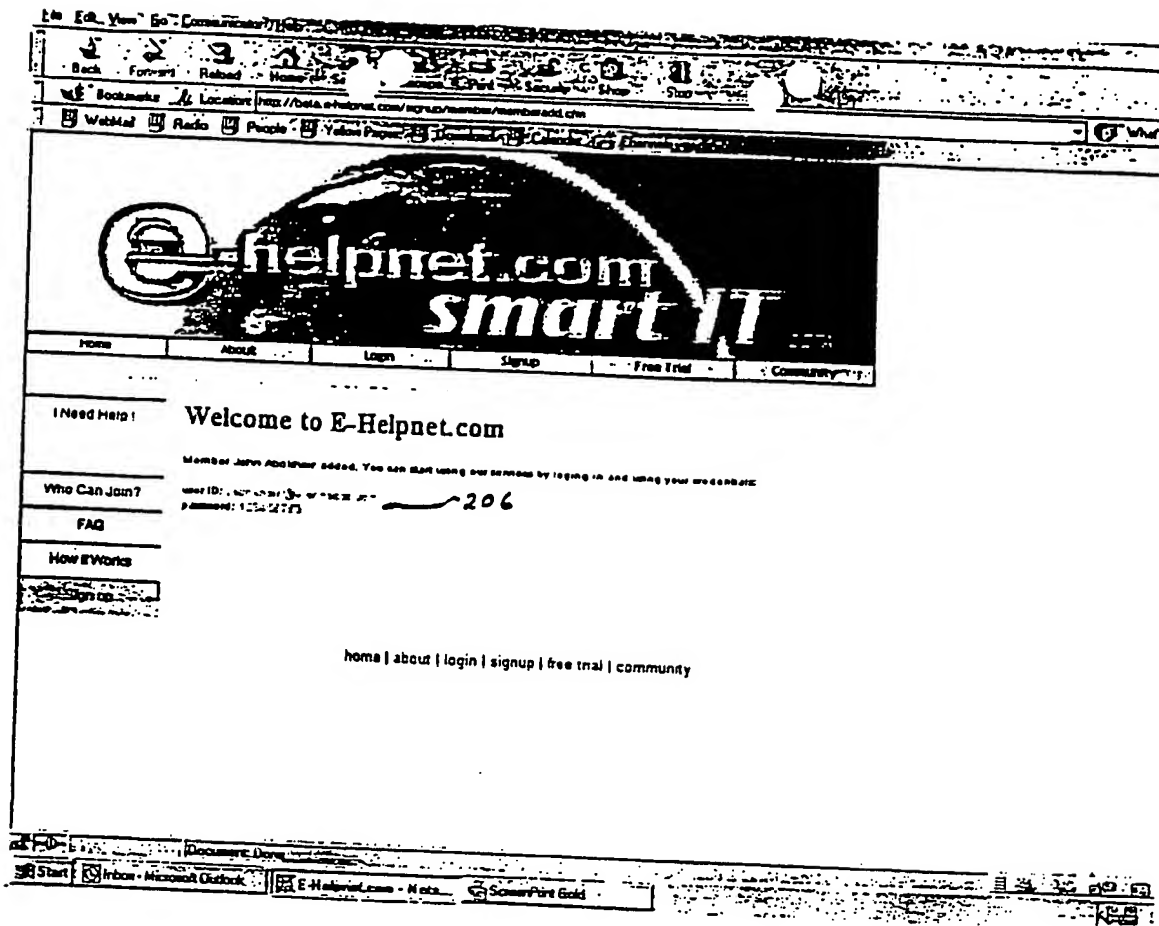


Fig. 7

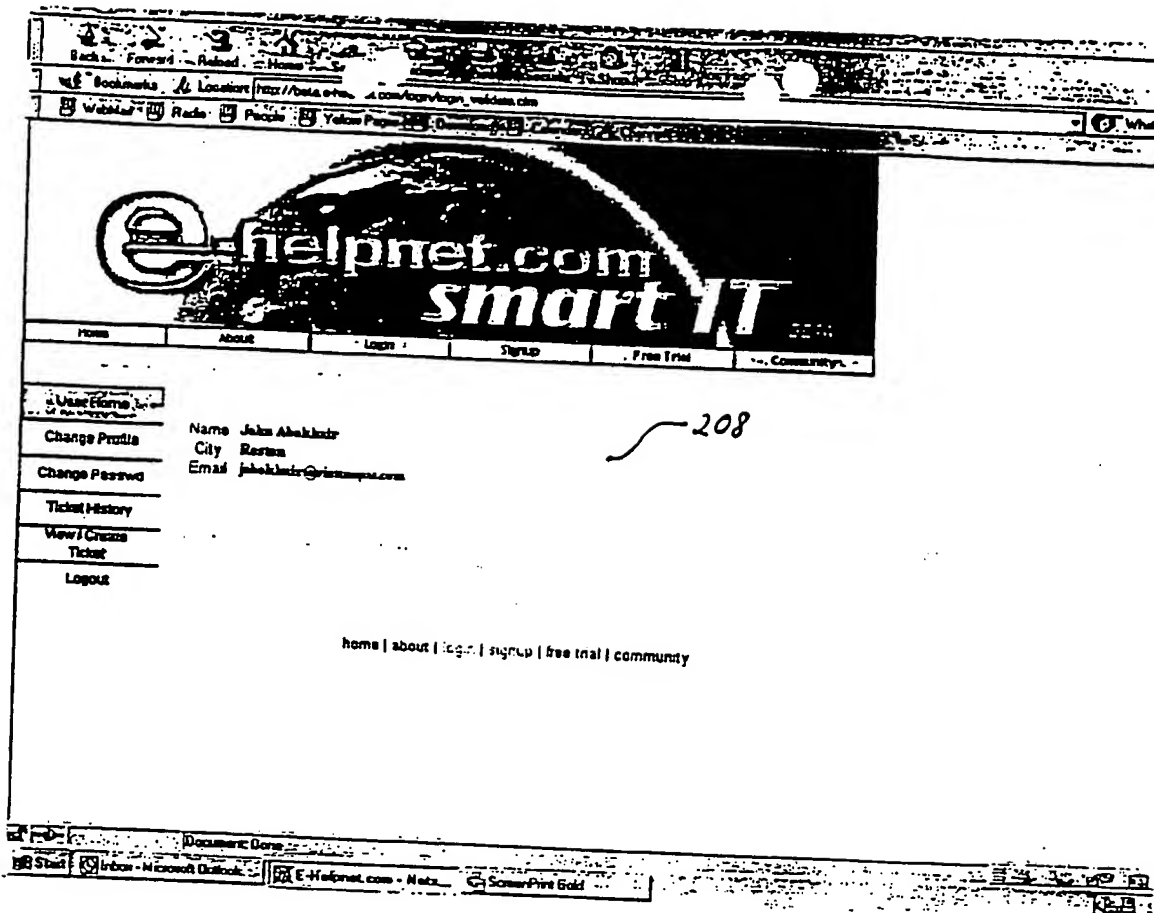


Fig. 8

The screenshot displays the E-helpnet.com website interface. At the top, there is a navigation bar with links: Home, About, Login, Signup, Free Trial, and Community. Below this, a user profile section shows the following information:

User Home	Name	John Abakhair
Change Profile	City	Rossmore
Change Password	Email	johnabakhair@e-helpnet.com

Below the profile section, there is a "Ticket History" section. To the right of this, there is a "New ticket?" section with a "New Ticket" button. Below this, there is a "Category" dropdown menu with "MS Exchange" selected. To the right of the "Category" dropdown, there is a "Problem description" text area. Below the "Problem description" text area, there is a "Enter Ticket" button and a "Reset" button. The interface is annotated with handwritten numbers: 210 points to the "New Ticket" button, 212 points to the "Category" dropdown, 214 points to the "Problem description" text area, and 216 points to the "Enter Ticket" button.

home | about | login | signup | free trial | community

Fig. 9

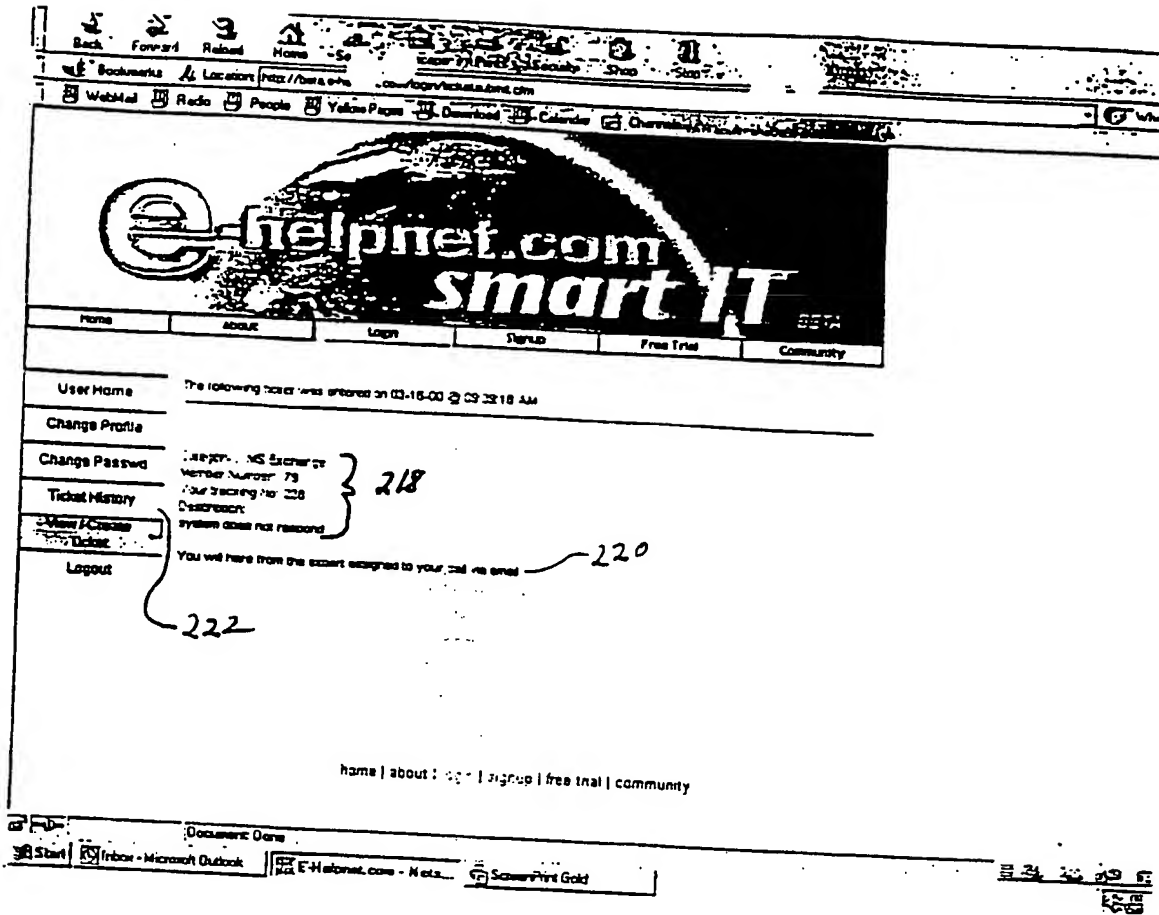


Fig. 10

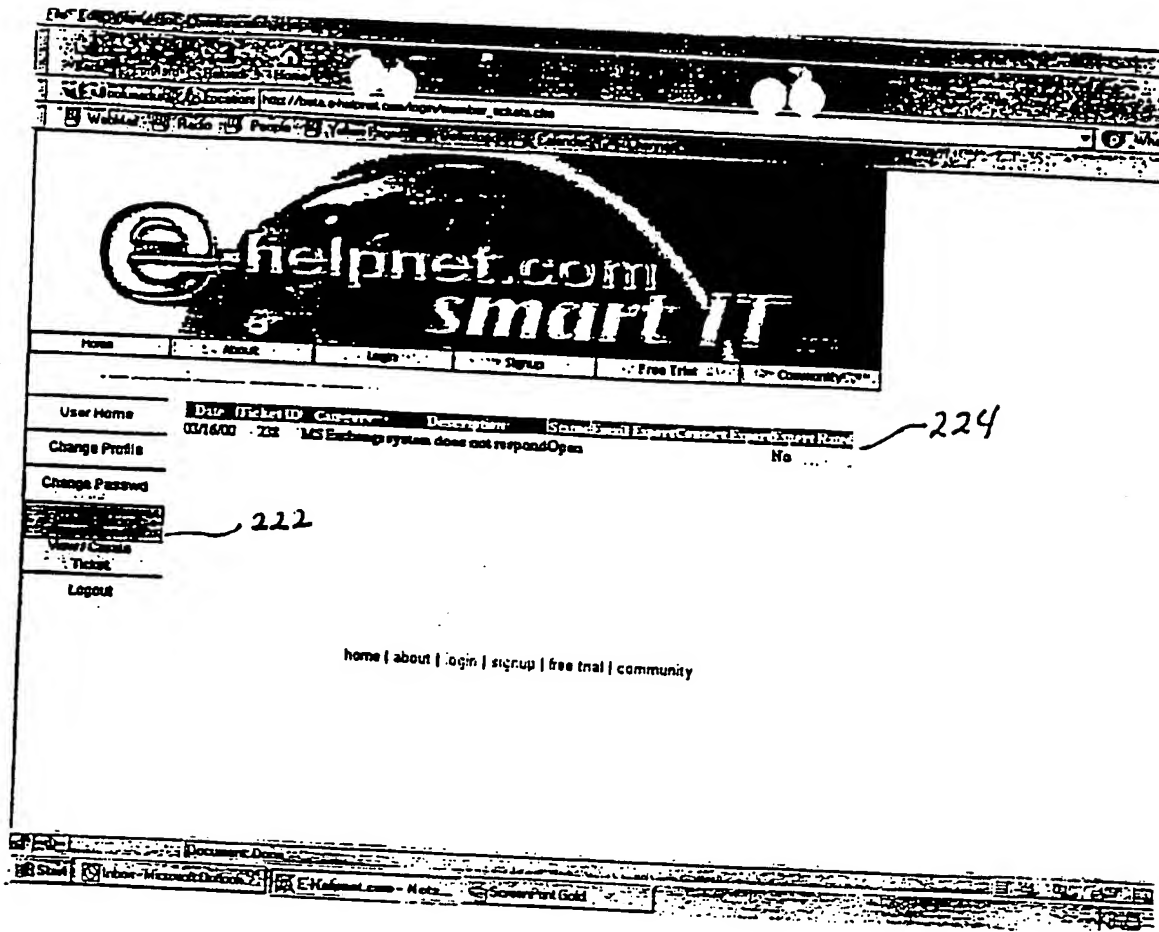


Fig. 11

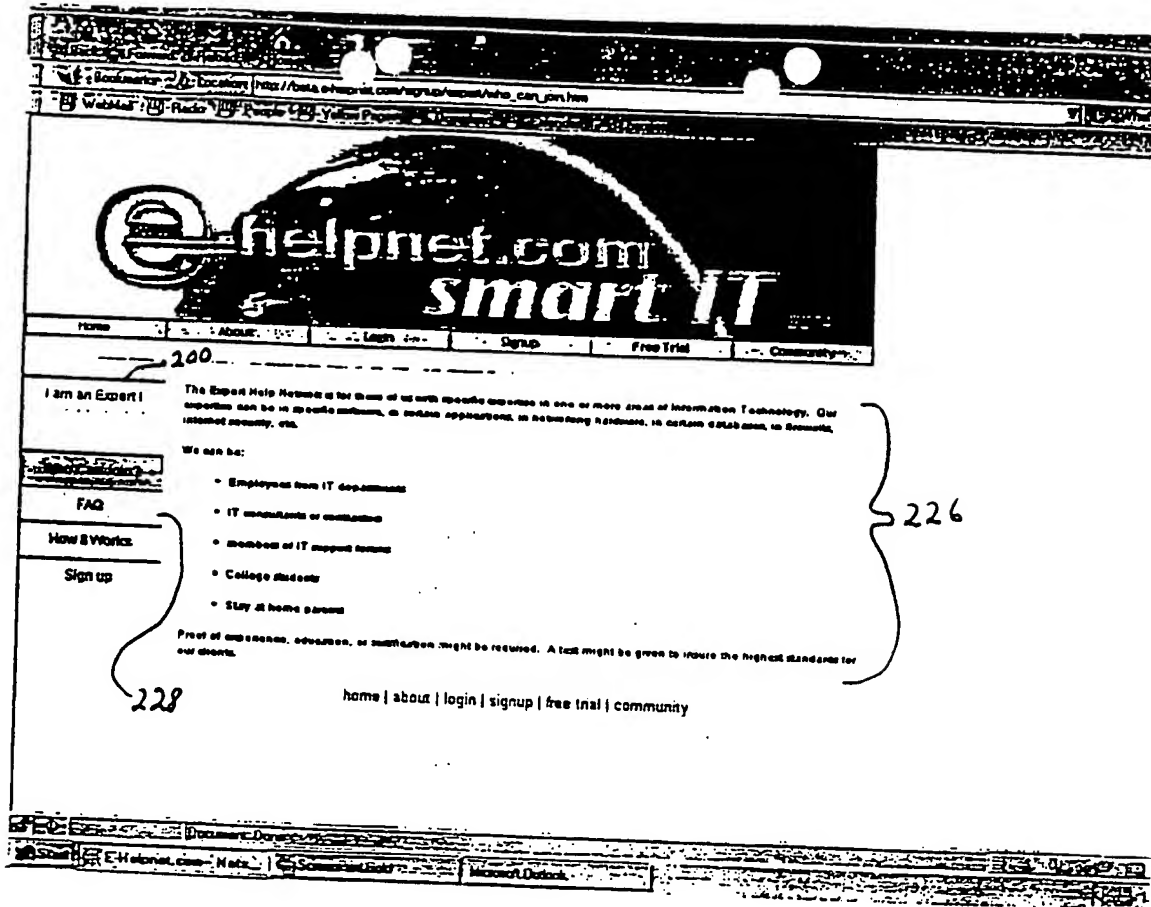


Fig. 12

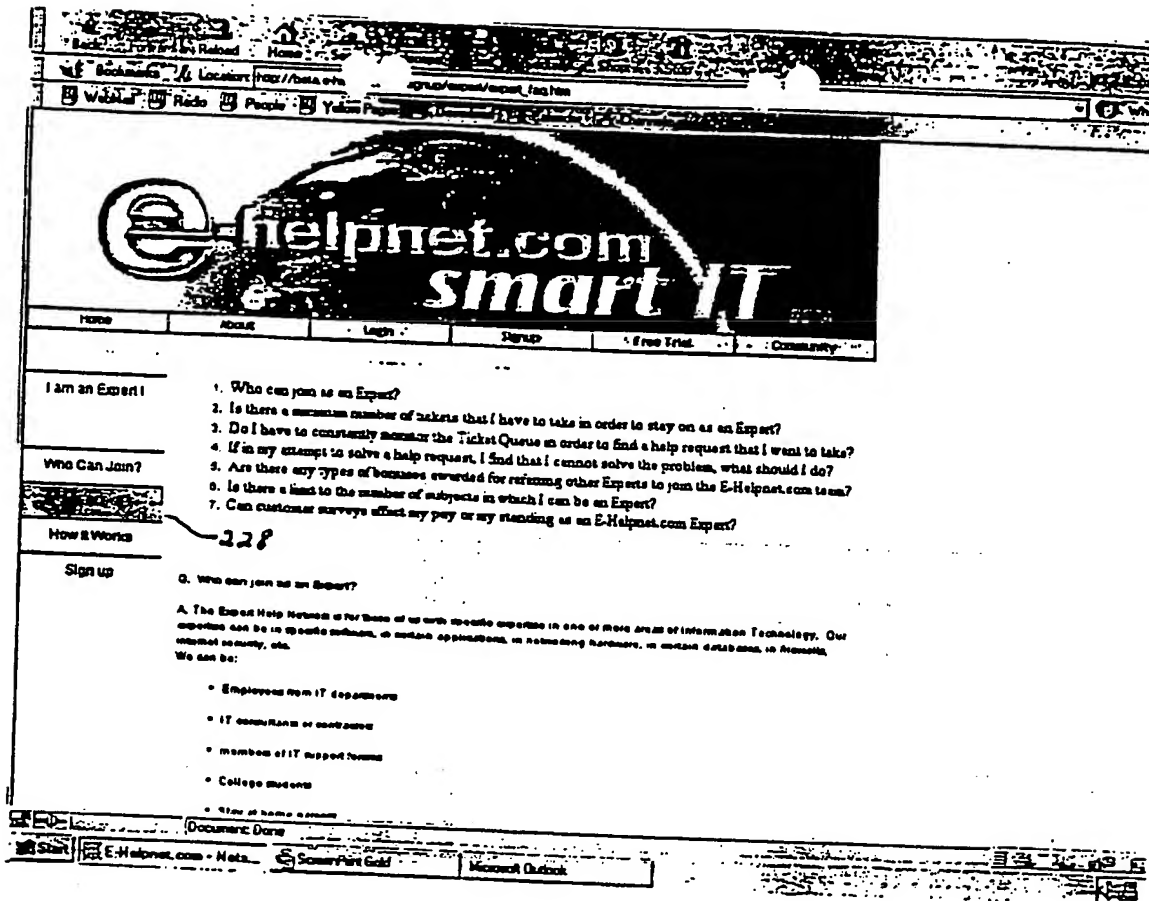


Fig. 13

Back Forward Reload Home

Bookmarks Location History

WebMail Radio People Yahoo Pages Downloads Calendar Chat

Print of agreement, conditions, or endorsement might be required. A fee may be given to insure the highest standards for our clients.

Q. Is there a maximum number of tickets that I have to take in order to stay on as an Expert?

back to top

A. As an Expert, you choose your own work plan. You can make as much money as you want like one help request or 100. Provide help or advice from home, the beach, or during your break at work. You can potentially earn more than your regular job for much less work!

back to top

Q. Do I have to constantly monitor the Request Queue in order to find a help request that I want to take?

A. E-Helper.net takes care of the busy work for you. We will match customer help requests with your expertise. An e-mail will be sent to your pager asking for your feedback. You can accept or decline the request either through your E-Helper.net page, or through our web site. You can accept as many requests as you want or feel like.

back to top

Q. If in my attempt to solve a help request, I find that I cannot solve the problem, what should I do?

A. _____

back to top

Q. Are there any types of bonuses awarded for referring other Experts to join the E-Helper.net team?

A. Absolutely! We are always looking to expand our network of Experts, and we know that the best way to do that is through direct referrals. Therefore, for each referral who successfully joins our team, you will earn extra credit points redeemable for cash.

back to top

Q. Is there a limit to the number of subjects in which I can be an Expert?

A. _____

back to top

Q. Can customer surveys affect my pay or my standing as an E-Helper.net Expert?

A. _____

back to top

Document Done

Share E-Helper.net - Netscape ScreenPaint Gold Microsoft Outlook

Fig 13a

Back Forward Reload Home Search
 Bookmarks Location: http://beta.e-hel.com/signup/faq/faq.htm
 WebMail Radio People Yahoo Pager Download Calendar Channel

Q. Is there a maximum number of setups that I have to take in order to stay on as an Expert?
 A. As an Expert, you choose your own work plan. You can make as much money as you want! Like one help request or 100. Providing help or advice from home, the beach, or during your break at work. You can potentially earn more than your regular job for much less work!
[back to top](#)

Q. Do I have to constantly monitor the Setup Queue in order to find a help request that I want to take?
 A. E-Helpnet.com lists one of the busy ones for you. We will match customer help requests with your expertise. An e-mail will be sent to your pager asking for your feedback. You can accept or decline the request either through your 2 way pager, or through our web site. You can accept as many requests as you want or feel like.
[back to top](#)

Q. If in my attempt to solve a help request, I find that I cannot solve the problem, what should I do?
 A.
[back to top](#)

Q. Are there any types of bonuses awarded for referring other Experts to join the E-Helpnet.com team?
 A. Absolutely! We are always looking to expand our network of Experts, and we know that the best way to do that is through direct referrals. Therefore, for each referral who successfully joins our team, you will earn extra credit points redeemable for cash.
[back to top](#)

Q. Is there a limit to the number of subjects in which I can be an Expert?
 A.
[back to top](#)

Q. Can customer surveys affect my pay or my standing as an E-Helpnet.com Expert?
 A.
[back to top](#)

[home](#) | [about](#) | [login](#) | [signup](#) | [free trial](#) | [community](#)

Document: Done
 E-Helpnet.com - Help
 Microsoft Outlook

Fig 136

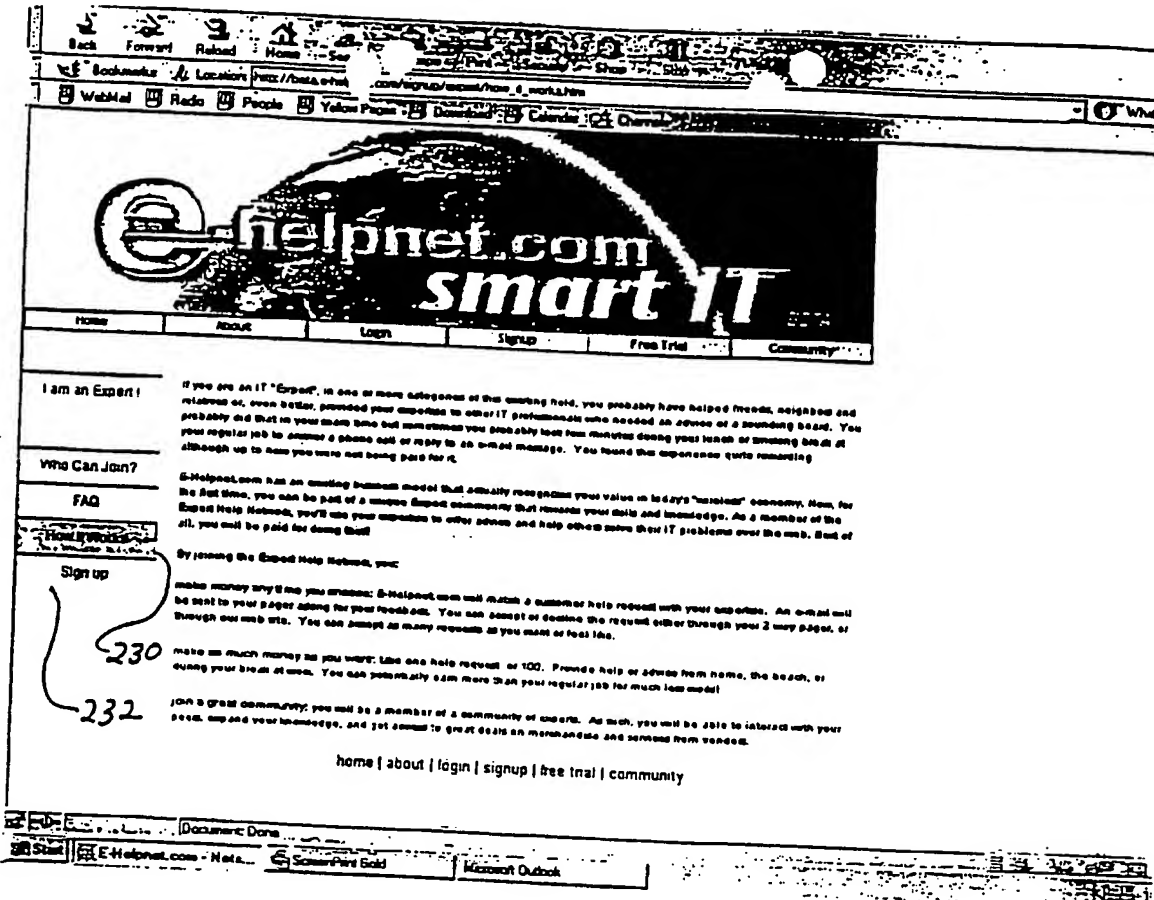


Fig. 14

File Edit View Go Communication Help

Back Forward Reload Home Stop

Bookmarks Location: http://www.e-helpnet.com/signup/expert/expert_signup.htm

WebMail Radio People Yellow Pages Download Calendar Chat

I am an Expert!

Who Can Join?

FAQ

How It Works

Sign Up

CONTACT INFO

First Name

Last Name

Password

Confirm Password

By email

By phone

By fax

By mail

City

State/province

Postal code

Country

234

236

Next Reset

Save and Exit

home | about | login | signup | free trial | community

Document Done

Start E-Helpnet.com - Net... ScreenPort Gold

12

Fig. 15

The screenshot displays the E-helpnet.com smart IT website interface. The header features the site logo and navigation links: Home, About, Login, Signup, Free Trial, and Community. A sidebar on the left contains links for 'I am an Expert!', 'Who Can Join?', 'FAQ', and 'How & Works'. The main content area is titled 'SKILLS' and contains a registration form with three rows of 'Year' and 'Type' dropdown menus. Below the form are 'Next', 'Reset', and 'Save and Exit' buttons. The browser's address bar shows the URL 'http://beta.ehelpnet.com/signup/express/express_registration.htm'. The taskbar at the bottom indicates the user is running Netscape, E-helpnet.com, ScreenPaint Gold, and Microsoft Outlook.

238

236

home | about | login | signup | free trial | community

Document: Done

E-helpnet.com - Netscape

ScreenPaint Gold

Microsoft Outlook

Fig. 16

The screenshot shows a web browser window with a navigation bar at the top containing links: Home, About, Login, Signup, Free Trial, and Community. Below the navigation bar is a sidebar with links: I am an Expert!, Who Can Join?, FAQ, How it Works, and Sign Up. The main content area is titled "EXPERIENCE" and contains the following fields:

- Client/Employer: [Text Input]
- Duration From: [mm / yyyy] To: [mm / yyyy]
- Your role/title: [Text Input]
- Description: [Large Text Area]
- URL: [Text Input]

At the bottom of the form are three buttons: Next, Reset, and Save & Exit. Below these buttons is a link labeled "Another Experience".

Handwritten annotations include "240" next to the Description field and "236" next to the Next button.

The browser's status bar at the bottom shows the address bar with "http://www.expert.com/expert_registration.php" and the taskbar with icons for Internet Explorer, Netscape, ScreenPaint Gold, and Microsoft Outlook.

Fig. 17

The screenshot shows a web application interface. At the top, there is a navigation bar with links: Home, About, Login, Signup, Free Trial, and Community. Below this, a sidebar menu on the left contains links: I am an Expert!, Who Can Join?, FAQ, How it Works, and Sign Up. The main content area is titled 'REFERENCE' and contains a form with the following fields: First name, Last name, Title, Company, Email, Phone, and Description. A handwritten number '242' is written next to the form. At the bottom of the form, there are buttons: Next, Reset, Save and Exit, and Another Ref. The bottom of the page features a status bar with the text 'home / about / login / signup / free trial / community' and a taskbar showing 'E-Webmail.com - Netscape', 'ScreenPrint Gold', and 'Microsoft Outlook'.

REFERENCE

First name: _____

Last name: _____

Title: _____

Company: _____

Email: _____

Phone: _____

Description: _____

Next Reset Save and Exit

Another Ref

home / about / login / signup / free trial / community

Fig. 18

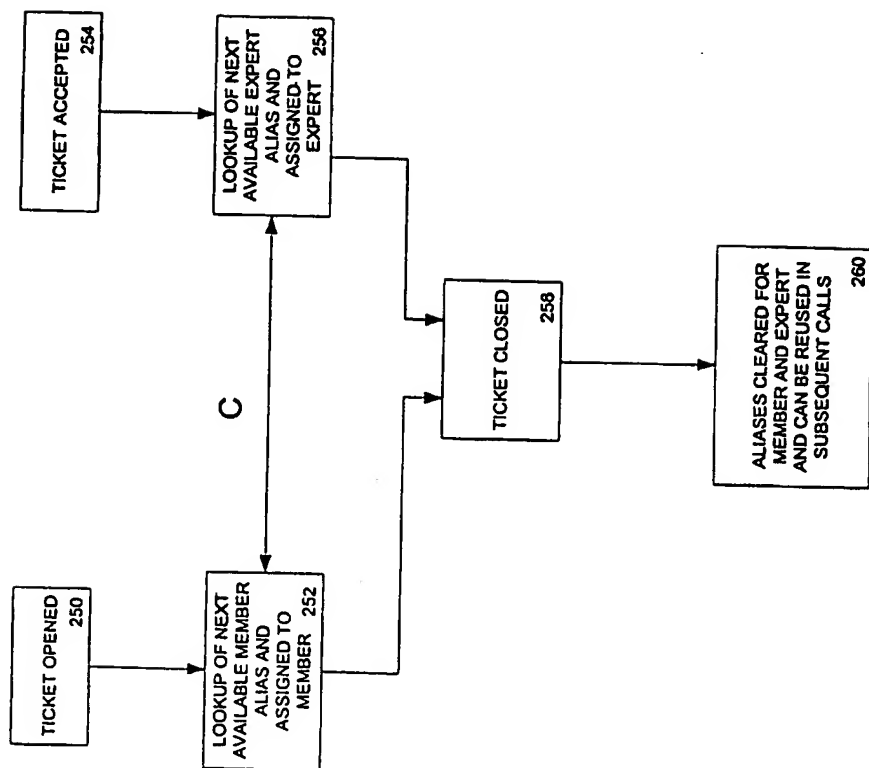


Fig. 19

C: Communication between Expert and Customer or other Expert